

MASS. IGL-2: M38/3

Massachusetts Certified Public Purchasing Official Program



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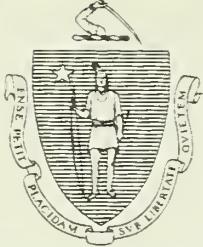
Program Description 2000-2001

A training and certification program in state and local government contracting for supplies, services, and construction.

Massachusetts Office of the Inspector General

Robert A. Cerasoli
Inspector General





The Commonwealth of Massachusetts Office of the Inspector General

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Dear fellow public officials and citizens:

The history of public procurement in the twentieth century is one of great accomplishment. Yet for most citizens the topic of government procurement is more likely to conjure up images of scandal and waste than accomplishment. Confidence in government has been eroded by procurement scandals, contractors that fail to perform, allegations of sweetheart deals, and unnecessary red tape that inflates contract costs and discourages good businesses from competing for public contracts. Public confidence in public procurement must be restored.

In 1997, my Office created the Massachusetts Certified Public Purchasing Official program to help public officials obtain the knowledge and skills necessary to achieve cost effective and ethical contracting in the increasingly complex commercial marketplace.

In addition to teaching participants about procurement and ethics laws, the MCPPO program helps to dispel myths that contribute to poor contracting practices. For example, the term "low bid" has acquired a negative connotation because some procurement officials have failed to set high standards for contractor performance and for the commodities and services that government requires. In recent years, federal and state procurement have focused on obtaining the "best value" instead of focusing solely on the "low bid." Best value contracting means evaluating past performance, quality, and price to select vendors that offer the most for each public dollar. Through the MCPPO program, participants learn that they can accomplish best value contracting within the context of the public procurement statutes.

The need for expertise and professionalism in public procurement is apparent. The MCPPO program is good news for public procurement officials, contractors, and the public.

Sincerely,

A handwritten signature in black ink that reads "Robert A. Cerasoli".
Robert A. Cerasoli
Inspector General

Massachusetts Certified Public Purchasing Official (MCPPO) Program



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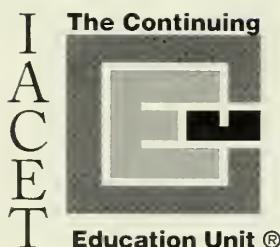
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Mission



The Massachusetts Certified Public Purchasing Official (MCPPO) program was created to ensure that the people who award, manage, and oversee public contracts in Massachusetts have the knowledge and skills necessary to perform at the high standards the public has a right to expect. The mission of the MCPPO program is to promote:

- cost-effective, ethical, and modern purchasing practices
- dialogue and exchange of ideas and best practices among procurement officials
- stewardship of resources in the public interest
- compliance with Massachusetts contracting laws



National Professional Development Standards

The MCPPO program meets rigorous national standards for professional development programs. The program has been authorized by the National Association of State Boards of Accountancy to award continuing professional education (CPE) credits and by the International Association of Continuing Education and Training to award continuing education units (CEU). Additionally, school business officials can qualify for professional development points (PDP) required under the state's Education Reform Act.



PDP

**ACE/
CREDIT**

You may also be able to earn graduate or undergraduate college credit by participating in the MCPPO program. Based on an in-depth review by a team of independent evaluators, the American Council on Education's College Credit Recommendation Program (ACE/CREDIT) has recommended that colleges and universities grant undergraduate and graduate credit for completion of MCPPO seminars.

Who Should Participate?

The MCPPO program is open to everyone. There are no prerequisites for admission to the program, but successful completion of an introductory course, either *Public Contracting Overview* or *State Contracting Overview*, is a prerequisite for advanced courses.

Anyone responsible for or interested in procurement by Massachusetts cities, towns, districts, authorities, or state agencies can benefit from this program. The MCPPO program provides a solid foundation in public contracting for supplies and services and for design and construction work on public works and public buildings.

This foundation is invaluable for:

- public managers and administrators
- procurement officers
- department heads and support staff
- public works and facilities managers
- resident engineers and project managers
- elected officials who authorize or approve public contracts
- lawyers, designers, and consultants involved in public contracting
- auditors and accountants who work with public entities
- procurement management team members



"Seminar was very informative. A lot of material was presented and now I know where to find information when questions come up."

December 1997 participant

Earning Professional Certification



The MCPPO program consists of a core curriculum that covers legal requirements and cost-effective practices for awarding and administering public contracts. The curriculum was developed in consultation with public purchasing officials and professional organizations. Each course combines instruction and hands-on workshops that apply contracting knowledge and skills to practical problems faced by procurement officials.

Each course in the core curriculum concludes with a written examination. Participants must attain a passing score on each examination to receive credit for the course and to earn certification.

Because municipal and other local government officials in Massachusetts follow somewhat different procedures for procuring supplies and services than the procedures used by state agencies, the MCPPO program offers two parallel tracks leading to certification. The core curricula for each of the two certification tracks are as follows:

The Massachusetts Certified Public Purchasing Official (MCPPO) Designation

For individuals with substantial responsibility for procurement, contract administration, or contract oversight on behalf of any local governmental entity, district, or authority or a state agency or authority not subject to the jurisdiction of the Operational Services Division.

Core Curriculum

- Public Contracting Overview*
- Design and Construction Contracting*
- Supplies and Services Contracting*

The Massachusetts Certified State Purchasing Official (MCSPO) Designation

For individuals with substantial responsibility for procurement, contract administration, or contract oversight on behalf of a department subject to the jurisdiction of the Operational Services Division.

Core Curriculum

- State Contracting Overview*
- Design and Construction Contracting*
- Supplies and Services Contracting (coursework currently being developed)*

Requirements for MCPPO and MCSPO Designations

To earn either the MCPPO or MCSPO designation, you must currently serve in a public purchasing position and meet the following education and work experience requirement:

| Designation | Education | Work Experience |
|---|--|---|
| MCPPO or MCSPO | High school diploma or equivalent, and successful completion of 3 designated seminars from the core curriculum Or Bachelor's degree and successful completion of the 3 designated seminars Or Bachelor's degree, qualifying graduate degree and successful completion of the 3 designated seminars | 5 years public procurement, including 2 years management or supervisory experience in Massachusetts 4 years public procurement, including 2 years management or supervisory experience in MA 3 years public procurement, including 2 years management or supervisory experience in MA |
| MCPPO for Design and Construction Contracting or MCSPO for Design and Construction Contracting | High school diploma or equivalent and successful completion of 2 designated seminars from the core curriculum [same criteria as above for education substitutes] | [same criteria as above] |
| MCPPO for Supplies and Services Contracting or MCSPO for Supplies and Services Contracting | High school diploma or equivalent and successful completion of 2 designated seminars from the core curriculum [same criteria as above for education substitutes] | [same criteria as above] |

Individuals with less work experience may qualify for an "Associate MCPPO" or "Associate MCSPO" designation with as little as one year's experience. All applicants for a designation must also meet the program's standards for integrity.

For more detailed information on the requirements for MCPPO certification, visit our website at www.state.ma.us/jg or call (617) 523-1205 and request an MCPPO designation application form.



Public Contracting Overview

Prerequisites: None

"Well organized – good presenters – tailored to our needs as town officials – lots of examples – lots of time for questions – great workbook – good exercises"

September 1999 participant

This three-day course is designed to provide an overview of legal requirements for public contracting by local governmental entities, districts, and authorities. This course includes hands-on exercises that apply contracting knowledge and skills to practical problems faced by procurement officials. It concludes with a written examination. (Officials of state departments subject to the jurisdiction of the Operational Services Division should consider enrolling in the *State Contracting Overview* seminar.)

Topics covered include:

- best value contracting
- overview and context of public purchasing
- principal objectives of public purchasing
- the purchasing cycle
- market research, value analysis, and life-cycle costing
- roles and functions in a purchasing system
- service and control advantages of centralized purchasing
- purchasing supplies and services under M.G.L. c. 30B
- designer selection and construction bid laws
- legal requirements for public contracts
- public contracts under Article 2 of the Uniform Commercial Code
- drafting contract terms
- consumer protection, contractor debarment, and antitrust law
- prevailing wage laws
- ethics laws and considerations

This course qualifies for 20 continuing professional education (CPE) points, 2 continuing education units (CEU) and 20 professional development points (PDP).

For dates and locations currently open for registration in *Public Contracting Overview*, visit our website at www.state.ma.us/ig.

State Contracting Overview

Prerequisite: None

"A well thought out, well planned, well executed course... All instructors were well prepared, knowledgeable and effective—one of the best public service courses I have attended."

March 2000 participant



This four-day course is designed to provide an overview of legal requirements for public contracting and hands-on exercises that apply contracting knowledge and skills to practical problems faced by state procurement officials. It concludes with a written examination.

Topics covered include:

- best value contacting
- overview and context of public purchasing
- structure of state government and sources of law
- the principle objectives of public purchasing
- the Operational Services Division and the purchasing process
- market research, value analysis, and life-cycle costing
- essential elements of an internal control plan for purchasing
- legal requirements for public contracts
- public contracts under Article 2 of the Uniform Commercial Code
- drafting contract terms
- consumer protection, contractor debarment, and antitrust laws
- writing effective specifications
- developing performance standards and measures
- contract administration for commodities and services
- developing a long-range capital equipment plan
- using term leases and tax-exempt lease purchases
- prevailing wage laws
- designer selection and construction bid laws
- ethics laws and considerations

This course qualifies for 26 continuing professional education (CPE) points, 2.6 continuing education units (CEU) and 26 professional development points (PDP).

For dates and locations currently open for registration in *State Contracting Overview*, visit our website at www.state.ma.us/ig.



Design and Construction Contracting

Prerequisites: *Public Contracting Overview*
or *State Contracting Overview*

"Excellent seminar- thorough and comprehensive with helpful materials to take home."

January 1999 participant

This three-day course is tailored to public officials facing the complex issues of today's design, public works construction and public building construction contracts. Through hands-on participation, you will learn practical applications and effective strategies to guide you through the legal requirements of these contracts. The course concludes with a written examination. Participants must have successfully completed the *Public Contracting Overview* or *State Contracting Overview* seminar prior to enrollment.

Topics covered include:

- overview of public construction in Massachusetts
- the three major stages of a public construction project
- the roles of the owner, contractor, designer, and construction manager
- qualifications-based selection of designers
- the contractor certification process
- filed sub-bidding
- value engineering
- design-build and other alternative construction methods
- feasibility studies and project planning
- essential elements of an owner-designer contract
- evaluating and selecting architects and engineers
- procuring construction contracts under M.G.L. c. 149 and M.G.L. c. 30, §39M
- the objectives and importance of contract administration
- baselines for performance in a design contract
- design and construction contract terms that help protect the owner
- strategies for avoiding disputes with contractors
- types of documentation that are critical to every construction project
- keys to effective communication on construction projects
- analyzing and administering change orders effectively

This course qualifies for 20 continuing professional education (CPE) points, 2 continuing education units (CEU) and 20 professional development points (PDP).

Supplies and Services Contracting

Prerequisites: Public Contracting Overview

"I am impressed with the ability of the instructors to teach so many different government groups and address all of the various questions."

June 1999 participant



This three-day course, which concludes with a written examination, provides an in-depth study of procurements under the Uniform Procurement Act, M.G.L. c. 30B. This course includes hands-on exercises designed to involve the student in the learning process. Participants must have successfully completed the *Public Contracting Overview* seminar prior to enrollment.

Topics covered include:

- overview of M.G.L. c. 30B
- writing effective specifications
- developing performance standards and measures
- streamlining the purchasing process
- obtaining best value using an invitation for bids
- the request for proposals process
- creating and applying criteria to evaluate proposals
- contract administration for supplies and services
- dealing with contractor performance problems
- common bidding problems and how to resolve them
- multi-year contracts, leases, and lease-purchases
- public-private partnerships

This course provides 20 continuing professional education (CPE) points, 2 continuing education units (CEU) and 20 professional development points (PDP).

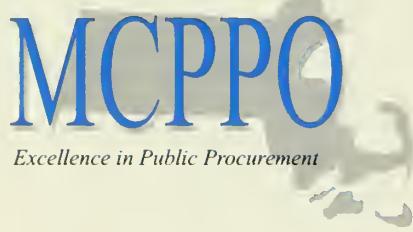
For dates and locations currently open for registration in *Supplies and Services Contracting*, visit our website at www.state.ma.us/ig.

Continuing Education

Once you have earned a designation from the MCPPO program, you will want to maintain your professional proficiency in the procurement field to qualify for recertification every three years. The MCPPO program recertification standards require that you earn at least sixty (60) qualifying continuing education credits during the three-year period. The standards allow you to earn credits through continuing education and training and other professional activities.

There are many sources of education and training that qualify for continuing education credits under the standards. The MCPPO program is a low-cost, high-quality source for continuing education and training. For example, last year the MCPPO program sponsored a seminar called *Electric Utility Restructuring and Public Power Procurement* with the Massachusetts Division of Energy Resources. The MCPPO program is developing other continuing education opportunities including seminars and self-paced study programs.

Watch for our *Local Government Real Property Transactions Under M.G.L. c. 30B* seminar that will be offered beginning in the spring of 2000. For information on this and other continuing education programs, visit our website at www.state.ma.us/ig.



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